2021 2022

CHARITY RECORDS WORKBOOK

To assist with online submission of Local Lodge Volunteer, Youth, Charitable and Community Service Programs at https://www.elks.org/grandlodge/charity/default.cfm

Lodge Name: _____No._____District _____

City (if different from above): _____State _____

Benevolent and Protective Order of Elks
of the United States of America

• • • IMPORTANT • • •

RETAIN IN FILES FOR TAX-EXEMPTION PURPOSES

Prepared by the Office of the Grand Secretary

Code 511100

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Instructions

Keep this workbook at the Secretary's desk. Immediately before or after the Lodge meeting when an activity committee makes its final report, a member of the Committee must enter the required figures in the appropriate page, category and columns with the assistance of the Secretary. Copies of the tear-out Data Collection Survey form, found in the back of this book, should be made and given to each committee for reporting its activities. The District Deputy will verify that this workbook has been kept up-to-date on the annual Lodge visitation.

GENERAL:

For each program observed by your Lodge, complete Columns (A) through (J) as accurately as possible for the ***date on*** which the event occurred; or if the program spanned several months, enter under the date the program closed. For those programs not specifically captioned, enter a brief description in the "CATEGORIES NOT COVERED" space and enter figures.

Columns (E) and (F): If accurate hours are not available, estimate as precisely as possible. Remember, if the committee consists of six Elks who worked as a group for an elapsed time of 3 hours, the total ELK HRS. should be "18" (6 times 3). DO NOT ENTER fraction or decimal parts of an hour – Round off to whole hours!

Columns (G) and (H): Actual or estimated mileage traveled in the preparation for or during the event itself. As in the hours above, if four people traveled a distance, the figures entered should be the product of number of people times distance traveled BOTH WAYS – ROUND TRIP! DO NOT ENTER fraction or decimal parts of a mile – Round off to whole miles!

Column (I): Cash value or equivalent of actual items (do not include hours or miles; include telephone charges or postage) used or given in a program. If in doubt about value of such items as used clothing or donated eyeglasses, contact other charitable organizations and ask what they or the IRS suggest as valuation guidelines. Door prizes, decks of playing cards for vets, etc. – you don't realize at first how much of value is donated in most programs without being tallied; take your time and get everything down; make notes as you go along. DO NOT ENTER dollar signs, cent signs, decimal points or cents – Round off to whole dollars and enter numbers ONLY!

Column (J): Cash, check or money order given or donated; if a U.S. Savings Bond, use purchase value – not value at maturity. DO NOT ENTER dollar signs, cent signs or decimal points or cents – Round off to whole dollars and enter numbers ONLY!

Example: Lodge held a bicycle safety and identification event in its parking lot on June 15, 2020 for 217 children with 6 Elks and 4 non-Elk Helpers who spend 7-¼ hours in planning and conducting the activity, making refreshments (value $130.55 if purchased ready-to-eat), giving out a $10 prize for the safest bicycle, with an Elk and a Helper driving 27-½ miles round-trip to obtain free bicycle safety booklets from the nearby Government office.

Enter information on page 2 as follows:

YOUTH ACTIVITIES (Includes Youth Week) — 1004

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)	1004
6/15/2022	Bicycle Safety Program	217	6	4	44	29	28	28	131	10	
	ANNUAL TOTAL	217	6	4	44	29	28	28	131	10	

In this example, if no other Youth Activities events were held during the year, these figures are carried down to the "ANNUAL TOTAL" line in the book and on the Grand Lodge Report (Page Two – Side One). If there are more programs for which there are insufficient spaces than the booklet provides, it may be necessary to insert an extra sheet in the book upon which figures should be entered in the same format as the regular pages. **NOTE:** ***Programs should be placed in the most applicable main category; however, if a program does not fit a specific category, it should be listed under "CATEGORIES NOT COVERED" – Section 9999. Lodges may choose to identify these miscellaneous programs internally by a computer-based identifier and total those for entry into the book and on the Annual Report at the end of the year.*** Likewise, if there are multiple entries for one month in the same category (having a single computer-entry number), the figures must be combined in the booklet. Exact figures should be used if available; otherwise estimate as accurately as possible. At the end of the Lodge year, the Secretary should total the columns for all categories and enter the totals in the Annual Report. Lodges are reminded that they are required to file the report to the Grand Secretary at https://www.elks.org/grandlodge/charity/default.cfm. The deadline is on or before May 1.

State Association
Charitable Reporting Guidelines

The following is a guideline for all State Association Officers, Committee Members, District Officers and Association Members in general to help in uniformity of reporting. On or before May 1 of every year, the State Associations must fill out page two of the online Annual Report form listing all donations, hours, expenses and mileage, from Elks and non-Elks. The form can be found at https://www.elks.org/members/statesecys/StateCharityReport.cfm.

This list hopefully will assist in the reporting and enable all State Associations to report the same items nationwide. These suggested categories are not intended to be the only reported details as every State Association may have other entries to report as well. They will serve as a starting point and can be added to, according to need:

1. Total mileage to and from functions, meetings, Lodge visits and all other Elks-involved visitations, of a chartitable nature.
2. Total hours spent traveling to meetings, functions, Lodge visits, etc. for charitable purposes.
3. Total hours spent planning for, working on and attending above-mentioned events.
4. All Elks-related long distance phone charges and postage for charitable purposes.
5. Major Project income and budget amounts not reported by individual Lodges.
6. All charitable donations at the District or State level.
7. All out-of-pocket monies or Association-supplied budget funds expended for charitable purposes.
8. Monies collected from charitable fundraisers.
9. Miscellaneous items as required.

It would be beneficial to report these items quarterly to your State Secretary with the final reporting before April 15. This will allow the State Secretary time to compile the report and submit by May 1 to the Grand Secretary at the https:www.elks.org link listed above.

YOUTH SCHOLARSHIPS — 1001

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1001

STUDENT OF MONTH/YEAR — 1002

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1002

SCOUTING PROGRAMS — 1003

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1003

YOUTH ACTIVITIES (Includes Youth Week) — 1004

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1004

ANTLERS PROGRAM — 1005

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1005

YOUTH ATHLETIC PROGRAMS — 1101

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1101

HOOP SHOOT® — 1102

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1 1 0 2

SOCCER SHOOT® — 1103

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1 1 0 3

SPECIAL SCHOOL PROGRAMS — 1201

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1 2 0 1

HANDICAPPED PROGRAMS — 1202

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1 2 0 2

SPECIAL EQUIPMENT USED — 1203

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1 2 0 3

STATE MAJOR PROJECT — 1204

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1 2 0 4

LODGE MAJOR PROJECT — 1205

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1205

PATRIOTIC PROGRAMS — 1301

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1301

VETERANS SERVICE EVENTS — 1401

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1401

VETERANS SERVICE ADOPT-A-VET — 1402

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1402

VETERANS SERVICE ARMY OF HOPE — 1403

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1403

VETERANS SERVICE WELCOME HOME — 1404

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1404

VETERANS SERVICE STAND DOWN — 1405

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1 4 0 5

VETERANS SERVICE FACILITY SUPPORT — 1406

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1 4 0 6

COMMUNITY SERVICE DONATIONS — 1501

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1501

HEALTH FAIRS/BLOOD BANKS — 1502

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1502

LODGE FACILITIES DONATED — 1503

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1503

SENIOR CITIZEN PROGRAMS — 1504

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1504

FOOD BASKET PROGRAMS — 1505

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1505

NATURAL DISASTER RELIEF PROGRAM, INC. — 1508

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1508

PUBLIC SERVICE/CITIZEN RECOGNITION PROGRAMS—1601

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1 6 0 1

ELKS NATIONAL FOUNDATIONS DONATIONS — 1701

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1 7 0 1

DRUG AWARENESS PROGRAMS — 1801

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1 8 0 1

AUXILIARY ORGANIZATIONS — 1901

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

1 9 0 1

CATEGORIES NOT COVERED — 9999

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	—INVOLVEMENT— # ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	CONTRIBUTIONS (DOLLARS ONLY) NON-CASH (EST. VALUE) (I)	— CASH — (J)
	ANNUAL TOTAL									

9

9

9

9

Make copies as needed

Data Collection Survey of Volunteer, Youth, Charitable and Community Service Programs

Committee:_____ Date:_____

(A) Program: _____

(B) Number of Participants _____

(C) Number of Elks _____

(D) Number of Helpers _____

(E) Total Elk Hours _____

(F) Total Helper Hours _____

(G) Elk Miles _____

(H) Helper Miles _____

(I) Non-Cash Contributions _____

(J) Cash Donations _____

Column (A)	Describe Program
Columns (B) thru (D)	Count individuals — not couples, teams or groups.
Columns (E) and (F)	Indicate total hours — If 6 Elks worked 6 hours (6 × 6 = 36 total hours)
Columns (G) and (H)	Mileage traveled in preparation for an event itself. (Number of people times round trip miles.)
Column (I)	Cash value of contributions including hall donations, food, band, clothing, bingo, parties, gifts, eyeglasses — Do not include hours or mileage.
Column (J)	Actual cash, checks, money orders or purchase value of savings bonds donated.

Submitted by:_____

Must be completed and returned to the Secretary by the meeting following the program.

"Elks Care — Elks Share"

Make copies as needed

Data Collection Survey of Volunteer, Youth, Charitable and Community Service Programs

Committee:_____ Date:_____

(A) Program: _____

(B) Number of Participants _____

(C) Number of Elks _____

(D) Number of Helpers _____

(E) Total Elk Hours _____

(F) Total Helper Hours _____

(G) Elk Miles _____

(H) Helper Miles _____

(I) Non-Cash Contributions _____

(J) Cash Donations _____

Column (A)	Describe Program
Columns (B) thru (D)	Count individuals — not couples, teams or groups.
Columns (E) and (F)	Indicate total hours — If 6 Elks worked 6 hours (6 × 6 = 36 total hours)
Columns (G) and (H)	Mileage traveled in preparation for an event itself. (Number of people times round trip miles.)
Column (I)	Cash value of contributions including hall donations, food, band, clothing, bingo, parties, gifts, eyeglasses — Do not include hours or mileage.
Column (J)	Actual cash, checks, money orders or purchase value of savings bonds donated.

Submitted by:_____

Must be completed and returned to the Secretary by the meeting following the program.

"Elks Care — Elks Share"

Code 511100 Charity Records Workbook
Both Online and Printed versions revised February 2021.